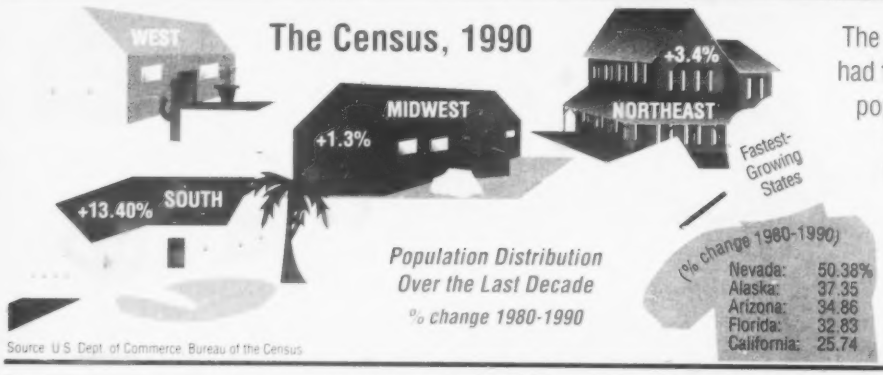
RB

RESTAURANT BUSINESS

SPECIAL REPORT

BUSINESS BAROMETER

The Census, 1990



Source: U.S. Dept. of Commerce, Bureau of the Census

The Northeast and Midwest had the smallest percentage population gains since the 1980 Census, while the West and South posted the biggest population percentage increases.

Soft Drinks: The Survey

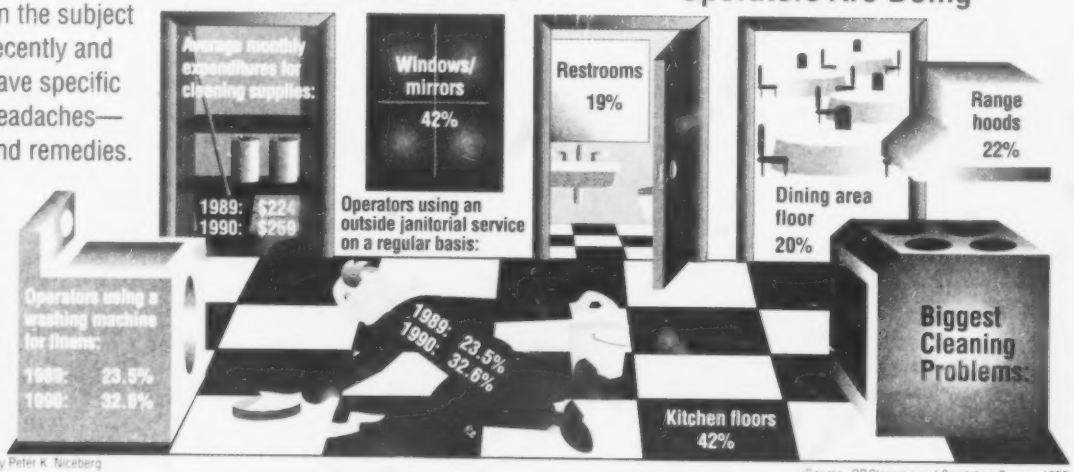
Almost all restaurant operators serve carbonated soft drinks. Regular cola is still the industry mainstay, but diet drinks and root beer are gaining favor, according to an *RB* survey of restaurant operators around the country.

% Change
Regular Cola 98.4 97.6 – 1.0
Diet Cola 73.8 77.4 + 4.8
Caffeine-Free Cola 39.5 36.6 – 7.4
Root Beer 42.6 48.6 +14.0
Lemon-Lime 66.3 70.1 + 5.7
Orange Soda 39.2 31.1 –20.7
Regular Ginger Ale 40.8 40.5 – 1.0
Diet Ginger Ale 4.6 7.0 +52.0
1988
% operators serving carbonated soft drinks

Source: *RB* Cold Beverage Survey, 1990

Cleanliness: What Operators Are Doing

Restaurant operators know patrons consider cleanliness as important as food quality and service. They were polled on the subject recently and have specific headaches—and remedies.

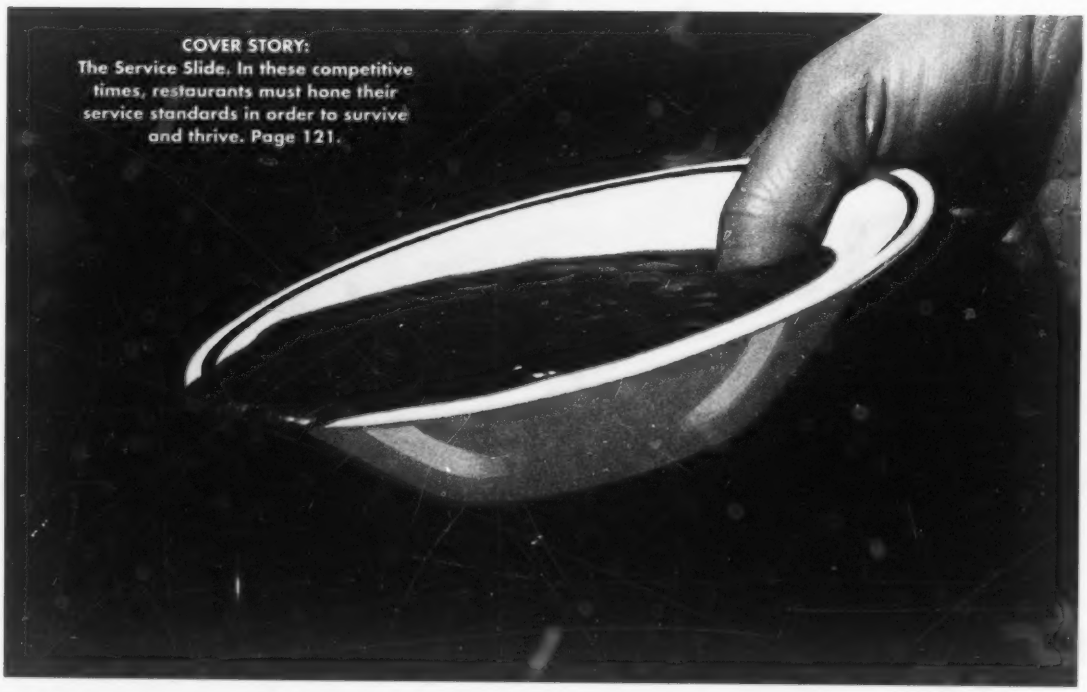


Charts by Peter K. Niceberg

Source: *RB* Cleaning and Sanitation Survey, 1990

RB CONTENTS

MARCH 20, 1991 VOL. 90, NO. 5



COVER STORY:
The Service Slide. In these competitive times, restaurants must hone their service standards in order to survive and thrive. Page 121.

COVER STORY

INDUSTRY ISSUE **THE SERVICE SLIDE.** In the '80s the focus was on food, but in the more competitive '90s, pragmatic restaurateurs are concentrating on service. 121

FEATURES

26TH ANNUAL **FRANCHISING REPORT.** Once again, *RB* offers the most current information on franchising in America. As in past years, we cover the top 11 major market segments—hamburger, chicken, seafood, pancake, pizza, Mexican, steak, sandwich, ice cream/yogurt, donut, and c-store—as well as a report on the state of franchise relations and the Top 50 franchise systems. 69

SPECIAL SECTIONS

HAMBURGER 70
CHICKEN 72
SEAFOOD 74
PANCAKE 76
PIZZA 80
MEXICAN 84
STEAK 89
SANDWICH 92
ICE CREAM/YOGURT 98
DONUT 100
C-STORE 104
FRANCHISE RELATIONS 106
INDUSTRY SUMMARY 109
TOP 50 FRANCHISE SYSTEMS 116

MARKET SEGMENT REPORT **AMERICAN BISTRO.** Affordable food and beverages in a casual, relaxed atmosphere is what the dining-out public is looking for today. The challenge to operators is how to provide quality yet still preserve profit margins 145

Cover illustration by Marvin Mattelson.

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FOOD AND BEVERAGE

DRAFTS, CARAFES & SPIRITS **THE INTELLIGENT BEER LIST.** A balanced beverage menu includes both standard favorites and a sprinkling of exotic brews. 139

BAR MANAGEMENT GUIDE 142

MENU IDEAS **BEEF.** Leaner cuts and smaller portions are luring diners back to red meat. Beef is back, starring on the center of the plate. 153

CHEF'S ART **GAIER & FRASIER.** At Arrows restaurant in Ogunquit, ME, this team serves a dish with duckling cooked three ways. 158

PRO'S PANTRY **EGGS.** An examination of the different forms in which this versatile food can be found, including no- and low-cholesterol versions. 161

PIECE MEAL **CHILES RELLENOS.** American chefs are taking the concept of roasted stuffed peppers to the limit with endless variations. 163

COLUMNS AND DEPARTMENTS

BUSINESS BAROMETER 2

EDITORIAL 8

RESTAURANT OPENINGS 16

INSIGHTS Industry News 20

MENU PLANNER'S GUIDE 46

SANITATION Handling Leftovers 62

COMPUTER LINK The Impact of New Technology 64

CALENDAR 166

EQUIPMENT I.Q. Take-out and Delivery Systems 168

BUYER'S CIRCLE Noteworthy Equipment 172

CLASSIFIED ADVERTISEMENTS 183

LATE LINE Last-minute Newsbreaks 189

INDEX 191

SOUND OFF Is Service Sliding? 192

READER COMMENT CARD 193

INDUSTRY REPORTS AVAILABLE

Reprints of the **1990 RESTAURANT GROWTH INDEX** and **1991 MAJOR FORCES IN FRANCHISING** are available for $7 per copy. Direct inquiries to Editorial Director Peter Berlinski, *Restaurant Business*, 633 Third Ave., New York, NY 10017.

IN THE NEXT ISSUE

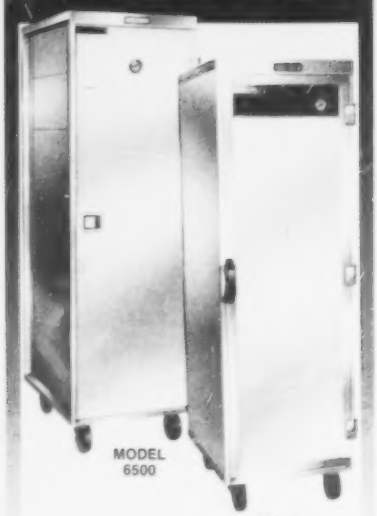
COVER STORY **THE GREENING OF FOODSERVICE.** It has become clear that proactive good citizenship will be a point of marketing and competition. Operators are trying to sort through the piles of information, misinformation, and concerns, which include: disposable packaging; source reduction, organic and manufactured; biodegradability; and the balancing act between recycling, landfills and waste-to-energy options.

MARKET SEGMENT REPORT **MEXICAN.** The Mexican segment remains among the most active, despite some slowdown in franchise development. With the segment's Southwestern stronghold fairly saturated, several companies are focusing growth plans on the Midwest, Southeast, and, to a lesser extent, the economically troubled Northeast.

SPECIAL REPORT **EURO DISNEYLAND.** Outside Paris on 5,000 acres—about one-fifth the size of that city—lies the future: Euro Disneyland. Opening in April 1992, this theme park will have six hotel properties to start, with 11 million annual guests projected.

TEST KITCHEN:
Beef, p. 153.

HOLDING PROOFING



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RESTAURANT FRANCHISING 1990-1991
SALES ($000)

MAJOR ACTIVITY	1990 Total	1990 Company-Owned	1990 Franchisee-Owned	1991* Total	1991* Company-Owned	1991* Franchisee-Owned
Chicken	$5,611,607	$2,033,873	$3,577,733	$5,948,303	$2,155,906	$3,792,397
Hamburg, Franks, Roast Beef	33,907,671	8,059,389	25,848,282	36,071,373	8,542,952	27,528,421
Pizza	11,952,189	4,830,486	7,121,704	13,251,754	5,168,620	8,083,134
Mexican	4,263,357	2,237,913	2,025,444	4,712,072	2,484,084	2,227,988
Seafood	1,633,876	948,825	685,051	1,718,944	1,001,010	717,933
Pancake, Waffle	1,402,659	494,963	907,696	1,463,304	514,762	948,542
Steak, Full Menu	12,367,662	6,507,364	5,860,298	13,350,604	6,962,879	6,387,725
Sandwich, Other	2,241,625	160,358	2,081,267	2,661,086	163,565	2,497,521
SUBTOTAL	$73,380,646	$25,273,170	$48,107,476	$79,177,438	$26,993,777	$52,183,661
Ice Cream, Yogurt	4,391,688	233,844	4,157,844	4,692,091	243,198	4,448,893
Donut	1,663,330	283,018	1,380,311	1,771,272	294,339	1,476,933
TOTAL	$79,435,664	$25,790,032	$53,645,631	$85,640,801	$27,531,314	$58,109,487

* Forecast

SOURCE: *Restaurant Business*/Technomic Inc.

continued on page 108

Real Cheese Can Make Your Menu Over...

For information circle number 15

BEST AVAILABLE COPY

FRANCHISE RELATIONS

FRANCHISE REPORT

RESTAURANT FRANCHISING 1990-1991
NUMBER OF UNITS

MAJOR ACTIVITY	1990 Total	1990 Company-Owned	1990 Franchisee-Owned	1991* Total	1991* Company-Owned	1991* Franchisee-Owned
Chicken	9,334	3,123	6,211	9,505	3,170	6,335
Hamburger, Franks, Roast Beef, etc.	38,241	7,903	30,338	40,113	8,258	31,855
Pizza	23,277	7,867	15,410	25,093	8,143	16,951
Mexican	5,593	2,382	3,210	5,884	2,513	3,371
Seafood	2,969	1,700	1,270	3,007	1,725	1,282
Pancake, Waffle	2,137	660	1,477	2,173	666	1,507
Steak, Full Menu	11,324	5,215	6,109	11,581	5,319	6,262
Sandwich, Other	8,414	399	8,015	9,624	407	9,218
SUBTOTAL	101,289	29,248	72,040	106,982	30,202	76,780
Ice Cream, Yogurt	14,681	638	14,043	15,249	644	14,605
Donut	4,197	864	3,333	4,314	864	3,450
TOTAL	120,167	30,750	89,416	126,545	31,710	94,835

* Forecast

SOURCE: Restaurant Business/Technomic Inc.

And Over...

Chicken Dijon with Tarragon Sauce

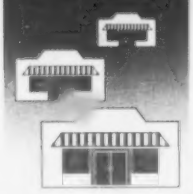
If your customers are bored with an ordinary chicken breast, dress it up with the great taste of cheese. We gave our chicken breast a fresh new look and taste by topping it with thinly sliced ham, American and Parmesan cheeses, fresh spices, Dijon-mustard, and a light tarragon sauce. Bring more value to an ordinary chicken breast with the great taste of cheese.

For information circle number 15

And Over...

Spinach Artichoke Dip

To give your chips and vegetables something unexpected to dip into, forget the standard dill or onion dip and serve this Spinach Artichoke Dip instead. We've blended artichokes, Cheddar, Mozzarella and Parmesan cheeses with chopped spinach in a sour cream base, and surrounded this delicious dip with pita chips and vegetables. Boost your check averages with this easy-to-sell appetizer!



FRANCHISE REPORT

SUMMARY

It will come as no surprise to anyone who follows the restaurant industry that last year was a difficult one for operators of all types. Accordingly, *Restaurant Business* has revised its own growth forecast for Eating Places to 5.9% (nominal) from the 6.4% reported in our September, 1990, issue.

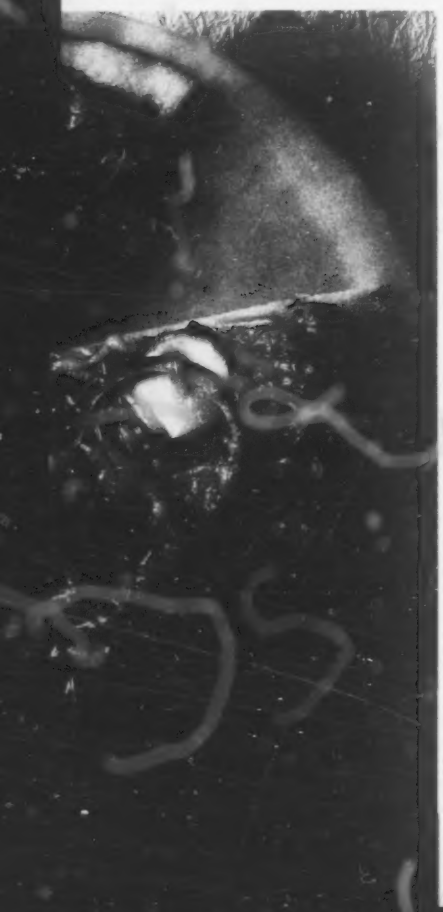
While not immune to the effects of economic conditions, the U.S. franchised restaurant industry has outperformed the eating place industry as a whole. Total sales for franchised restaurants grew by 8.6% in 1990, more than three percentage points greater than for all Eating Places. This indicates that with the unique advantages of proven business methods and systems, franchising remains one of the best chances for success for the small business owner.

GROWING SHARE. In aggregate, the U.S. franchised restaurant industry generated nearly $73.4 billion in retail sales in 1990, up more than $5.8 billion from the revised 1989 estimate of $67.6 billion. The 1990 sales estimate represents 46.3% of total Eating Place sales. The franchised restaurant industry added over 5,600 units in 1990, an increase of 5.9%, and now operates more than 101,000 restaurants.

The forecast for '91 calls for slower growth, but still healthier than the general industry. Franchise sales are expected to rise 7.9% to over $79 billion, while units should increase 5.6% to nearly 107,000. The hamburger segment dominates the U.S. franchised restaurant industry, as it does Eating

Franchise sales grew by 8.6% in 1990.

continued on page 111



And Over...

Garden-Style Pizza

Take advantage of your patrons' love of pizza while you tap into the vegetarian market with a meatless pizza that's heavy on the cheese! We combined assorted vegetables with fresh spices, and added loads of shredded Cheddar, Mozzarella and Parmesan cheeses. Then, we layered it high on a delicate cornmeal crust. This Garden-Style Pizza will satisfy real cheese pizza lovers!

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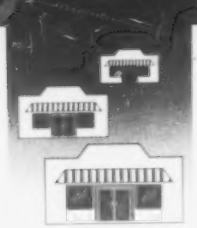
And Over...

American Antipasto

You'll increase your check averages when you tempt your customers to upgrade from a basic dinner salad to the American Antipasto. We've marinated Cheddar, American and Mozzarella cheeses with salami and assorted fresh vegetables, and topped it off with an Italian signature-style dressing. Increase your profits by making the American Antipasto your signature salad!



FRANCHISE REPORT

SUMMARY

U.S. FRANCHISED RESTAURANTS SUMMARY

ITEM	1989	1990	1991*	Percent Changes 1989-90	Percent Changes 1990-91
Company-owned units	28,396	29,248	30,202	3.0	3.3
Franchisee-owned units	67,225	72,040	76,780	7.2	6.6
Total number of units	95,621	101,289	106,982	5.9	5.6
Company-owned sales ($000)	$23,424,150	$25,273,170	$26,993,777	7.9	6.8
Franchisee-owned sales ($000)	44,136,376	48,107,476	52,183,661	9.0	8.5
Total sales ($000)	67,560,526	73,380,646	79,177,438	8.6	7.9
Avg. unit sales, company-owned units ($000)	$825	$864	$894	4.8	3.4
Avg. unit sales, franchisee-owned units ($000)	657	668	680	1.7	1.8
Total avg. unit sales ($000)	707	724	740	2.5	2.2

*Forecast NOTE: Data Excludes Ice Cream, Yogurt, and Donut Shops

SOURCE: *Restaurant Business*/Technomic Inc.

And Over...

Cheesy Eggs 'N Toast

For a better profit opportunity, try our Cheesy Eggs 'N Toast instead of ordinary scrambled eggs and toast. Just add shredded Cheddar, American and Mozzarella cheeses, diced ham, and green chiles to scrambled eggs. Melt cheese over toast points and serve salsa on the side. Our Cheesy Eggs 'N Toast will satisfy your patrons who have a craving for spicy, Tex-Mex fare.

For information circle number 15

And Over...

Kids Nachos

When you offer the little ones something to munch on before dinner, you create a whole new profit opportunity. Introducing an appetizer specifically designed for kids: Kids Nachos. We took crunchy tortilla chips and topped them with a special sauce, ground beef and a creamy American cheese sauce. Increase customer satisfaction by keeping the little ones occupied before their meals are served!

Places as a whole. The hamburger segment (which includes roast beef and hot dogs) had 1990 sales of nearly $34 billion, representing more than 46% of total franchised restaurant sales and nearly 38% of units.

However, the pizza, Mexican, and sandwich/other segments were the big news in terms of growth. In 1990, these three segments had sales growth of 15.8%, 15.0%, and 31.8%, respectively. A quick review of the Top 50 franchise systems shows that to a large degree, the leaders in these segments—Pizza Hut, Taco Bell, and Subway—provided much of this growth. Still, due its sheer size, the hamburger segment's 5.8% sales increase in 1990 translates into nearly $1.87 billion in additional sales, over $200 million more than the pizza segment, the closest runner-up in terms of percentage growth.

WINNERS AND LOSERS. Recent trends in segment performance show no sign of abating. Forecasts for 1991 call for the pizza, Mexican, and sandwich segments to lead all segments in rate of growth, while chicken, seafood, and hamburger will experience growth that is slower than the franchised industry.

The Top 50 franchised systems charts (see p. 116) have been revised this year to show more meaningful data. Specifically, international sales and units are shown separately, while company-owned and franchisee-owned data represents U.S. operations only. System totals continue to reflect both domestic and international operations. In addition, all data is now based on the calendar year.

Perennial leader McDonald's tops the Top 50 in both sales and units. Double-digit growth in total systemwide sales was registered by 22 chains within the Top 50, led by a whopping 92.5% at Rally's. Applebee's Neighborhood Grill & Bar enjoyed a 54% increase in systemwide sales to $228 million in 1990, to rank as the 50th largest franchise system.

Other notable performers include: Subway (50% increase in sales); Pizza

continued on page 112

And Over...

Pigs In The Blanket

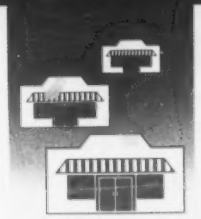
Rather than serving ordinary pancakes and sausage for breakfast, try this breakfast treat instead. To dress up this traditional breakfast fare, we took pancakes and topped them with juicy sausage and American cheese. Then we rolled them up and added a special cheese sauce. Make the morning meal a more profitable daypart and offer your customers Pigs in the Blanket.

For information circle number 15

And Over...

Steak Mozzarella

Beef up an ordinary steak the Italian way: with a touch of cheese. Our Steak Mozzarella has an elegant look and offers you the opportunity to charge more than you could with a plain steak. We seasoned our steak with fresh garlic and broiled to order. Then we topped it with a mixture of basil, tomato and shredded Mozzarella cheese and broiled it until the cheese was bubbly. So, beef up your profits with the added value of cheese.



FRANCHISE REPORT

SUMMARY

Hut (28%); Little Caesar (33%); Sbarro (28%); and Taco Bell (25%). Conversely, four chains—Long John Silver's, Western Sizzlin, Golden Corral, and Rax—all showed declines.

UNIT GROWTH. The Top 50 franchise systems ranked by units ranged from McDonald's with an estimated 11,162 units worldwide to Wienerschnitzel with 338 units. Only eight chains had double-digit unit growth. Subway led all chains with 1,084 new units, a 26.5% increase over 1989. Pizza Hut also showed strong unit growth with a net gain of 900 units, or nearly 13%. Other notable performances include: Hardee's (due in large part to its acquisition of Roy Rogers), with a 22% increase; Blimpie, with a 21% increase; and Little Caesar, with a 22% gain.

As the U.S. restaurant industry becomes saturated, many chains are focusing on international markets for growth. While the Top 50 franchise systems ranked by sales in aggregate had an 8.9% increase in domestic sales, international sales increased almost 20%. Similarly, the Top 50 franchise systems ranked by units had a 5.2% increase in domestic units versus a 12.9% increase in international units.

Nowhere is the international trend more apparent than at McDonald's. In 1990, its international operations contributed an estimated $6.3 billion to systemwide sales, or over a third. At Kentucky Fried Chicken, international sales represent nearly 45% of systemwide sales. KFC also leads all chains in terms of international units with 3,206 locations, just 26 more than McDonald's. Moreover, there are abundant opportunities in markets outside the U.S.; the opening of Eastern Europe adds to the potential. For this reason, international expansion by U.S. chains will continue to be a driving force for new sales and unit growth.

Text and data for this article were provided exclusively to Restaurant Business *by Technomic Inc. Technomic also provided the data for the Top 50 charts.*

And, A Menu Makeover Can Make You Money Over...And Over...And Over...

How can a Real Cheese Menu Makeover make you money over and over again? By making your entire menu more profitable with the added value and great taste of real cheese. Here's how it works.

Increases your menu's selling power.

When you add real cheese to a menu item, it gives your patrons the irresistible flavor they're looking for. And, because they place a higher value on dishes made with real cheese, you can charge more for them.

Turns your slow movers into hot sellers.

A Real Cheese Menu Makeover keeps your menu up to date with, and helps you profit from, ongoing ethnic trends. Any way you look at it, a Real Cheese Menu Makeover will help you make more money.

Send for your kit, today.

Our Real Cheese Menu Makeover kit includes recipe cards of the delicious dishes you've just seen, plus additional great tasting real cheese recipes. You'll also receive value-added menu ideas and loads of side dish suggestions to complement your updated menu items.

Give your menu the makeover it needs. Just write to: American Dairy Association, Foodservice Division, Department R12, Dairy Center, 6300 North River Road, Rosemont, IL 60018-4289.

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America's Dairy Farmers
American Dairy Association

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RESTAURANT FRANCHISING
GROWTH RATE IN SALES 1985-1991

MAJOR ACTIVITY	Total Sales Avg. Annual Growth (%) 1985-90	1990-91*	Company-Owned Avg. Annual Growth (%) 1985-90	1990-91*	Franchisee-Owned Avg. Annual Growth (%) 1985-90	1990-91*
Chicken	6.4	6.0	3.8	6.0	8.1	6.0
Hamburger, Franks, Roast Beef, etc.	7.7	6.4	6.6	6.0	8.1	6.5
Pizza	14.1	10.9	14.9	7.0	13.5	13.5
Mexican	12.2	10.5	11.3	11.0	13.3	10.0
Seafood	6.1	5.2	5.9	5.5	6.5	4.8
Pancake, Waffle	4.9	4.3	8.3	4.0	3.3	4.5
Steak, Full Menu	7.6	7.9	6.2	7.0	9.3	9.0
Sandwich, Other	26.9	18.7	5.3	2.0	30.2	20.0
SUBTOTAL	9.0	7.9	7.9	6.8	9.6	8.5
Ice Cream, Yogurt	8.1	6.8	(4.7)	4.0	9.2	7.0
Donut	8.7	6.5	1.5	4.0	10.6	7.0
TOTAL	9.0	7.8	7.7	6.8	9.6	8.3

* Forecast

SOURCE: *Restaurant Business*/Technomic Inc.

RESTAURANT FRANCHISING
GROWTH RATE IN UNITS 1985-1991

MAJOR ACTIVITY	Total Units Avg. Annual Growth (%) 1985-90	1990-91*	Company-Owned Avg. Annual Growth (%) 1985-90	1990-91*	Franchisee-Owned Avg. Annual Growth (%) 1985-90	1990-91*
Chicken	1.4	1.8	(0.7)	1.5	2.5	2.0
Hamburger, Franks, Roast Beef, etc.	4.6	4.9	3.5	4.5	4.9	5.0
Pizza	10.4	7.8	11.1	3.5	10.1	10.0
Mexican	6.3	5.2	5.0	5.5	7.3	5.0
Seafood	4.1	1.3	4.5	1.5	3.7	1.0
Pancake, Waffle	3.9	1.7	4.0	1.0	3.9	2.0
Steak, Full Menu	3.6	2.3	1.8	2.0	5.4	2.5
Sandwich, Other	25.9	14.4	(3.7)	2.0	29.8	15.0
SUBTOTAL	6.5	5.6	4.4	3.3	7.4	6.6
Ice Cream, Yogurt	2.3	3.9	(0.5)	1.0	2.4	4.0
Donut	3.2	2.8	(3.6)	0.0	5.6	3.5
TOTAL	5.8	5.3	4.0	3.1	6.5	6.1

* Forecast

SOURCE: *Restaurant Business*/Technomic Inc.

1989-90 Systemwide Sales by U.S. Company, U.S. Franchise, and International ($000,000)

Rank	Franchise System	1990 Company-Owned U.S.	1990 Franchisee-Owned U.S.	1990 International	1990 Total Systemwide	1989 Total Systemwide	'89-'90 % Total Change
1	McDonald's	$2,655	$9,597	$6,507	$18,759	$17,333	8.2
2	Burger King	935	4,315	850	6,100	5,700	7.0
3	Kentucky Fried Chicken	875	2,325	2,600	5,800	5,400	7.4
4	Pizza Hut	2,000	2,000	845	4,845*	3,785*	28.0
5	Hardee's	1,197	2,163	40	3,400*	2,900*	17.2
6	Wendy's	830	1,910	240	2,980*	2,969*	0.4
7	Domino's	575	1,890	185	2,650	2,500	6.0
8	Taco Bell	1,500	1,000	45	2,545	2,038	24.9
9	Dairy Queen	2	2,023	255	2,280*	2,179	4.6
10	Arby's	150	1,245	140	1,535*	1,370	12.0
11	Little Caesar's	395	1,053	52	1,500	1,130	32.7
12	Denny's	1,065	235	70	1,370*	1,300	5.4
13	Subway	3	1,127	70	1,200	800	50.0
14	Big Boy	228	812	60	1,100	1,100	0.0
15	Sizzler	337	566	110	1,014	898	12.8
16	Shoney's	437	554	0	991	862	15.0
17	Jack In The Box	636	317	0	953	859	10.9
18	Dunkin' Donuts	1	786	156	943	855	10.3
19	Long John Silver's	534	243	4	781	783	(0.3)
20	Ponderosa	450	250	35	735*	687	7.0
21	Baskin-Robbins	29	461	224	714*	682*	4.7
22	Bonanza Family Restaurants	2	545	68	615*	588	4.6
23	Carl's Jr.	466	143	5	614*	551	11.4
24	Church's Fried Chicken	375	150	50	575*	530	8.5
25	Popeyes Famous Fried Chicken	90	462	5	557*	525	6.1
26	T.G.I. Friday's	382	89	34	505	439	15.0
27	Western Sizzlin	5	469	6	480	482	(0.4)
28	Perkins Restaurants	152	320	4	476**	426	11.7
29	Chi-Chi's	369	101	0	470	420	11.9
30	Sonic	41	414	0	455	390	16.7
31	Chili's	340	105	0	445*	369	20.6
32	Captain D's	236	177	0	413	392	5.4
33	International House of Pancakes	39	313	32	384	356	7.9
34	TCBY	34	310	15	359*	303*	18.5
35	Ryan's Family Steak Houses	276	61	0	337*	295	14.2
36	Golden Corral	19	313	0	332*	368*	(9.8)
37	Houlihan's and Darryl's	293	27	0	320	306	4.6
38	Kettle Restaurants	210	109	0	319	302	5.6
39	Round Table Pizza	0	315	4	319	313	1.9
40	Rax Restaurants	99	200	2	301	326	(7.7)
41	Waffle House	135	165	0	300*	280*	7.1
42	ShowBiz Pizza	169	112	9	290	270	7.4
43	Ground Round	213	71	0	284	266	6.8
44	Marie Callender's	146	135	0	281*	250	12.4
45	Rally's	85	175	0	260	133	95.5
46	Sbarro	196	35	21	252*	197*	27.9
47	Village Inn	140	100	0	240	235	2.1
48	Godfather's Pizza	74	155	0	229	225	1.8
49	Applebee's Neighborhood Grill & Bar	30	198	0	228	148	54.1
50	Tony Roma's	36	180	0	216	182	18.7

*Restaurant Business/Technomic Estimate **Company Estimate Note: All data in millions of dollars for calendar year

1989-90 Systemwide Units by U.S. Company, U.S. Franchise and International

Rank	Franchise System	1990 Company-Owned U.S.	1990 Franchisee-Owned U.S.	1990 International	1990 Total Systemwide	1989 Total Systemwide	'89-'90 % Total Change
1	McDonald's	1,632	6,944	3,227	11,803	11,162	5.7
2	Kentucky Fried Chicken	1,364	3,617	3,206	8,187	7,945	3.0
3	Pizza Hut	3,300	3,300	1,400	8,000	7,100	12.7
4	Burger King	913	4,556	829	6,298	6,042	4.2
5	Domino's	1,168	3,835	373	5,376	5,158	4.2
6	Dairy Queen	5	4,617	585	5,207	5,206	0.0
7	Subway	10	4,923	237	5,170	4,086	26.5
8	Hardee's	1,350	2,615	45	4,010**	3,291	21.8
9	Wendy's	1,010	2,421	290	3,721*	3,755	(0.9)
10	Baskin-Robbins	135	2,143	1,040	3,318	3,324	(0.2)
11	Little Caesar's	783	2,414	103	3,300**	2,700	22.2
12	Taco Bell	1,851	1,359	67	3,277	3,124	4.9
13	Arby's	230	2,040	220	2,490*	2,339	6.5
14	Dunkin' Donuts	2	1,802	362	2,166	1,898	14.1
15	TCBY	170	1,604	73	1,847	1,582	16.8
16	Long John Silver's	980	454	12	1,446	1,475	(2.0)
17	Denny's	992	302	64	1,358	1,342	1.2
18	Church's Fried Chicken	795	317	105	1,217	1,179	3.2
19	Sonic	94	949	0	1,043	996	4.7
20	Jack In The Box	653	387	0	1,040	987	5.4
21	Big Boy	200	715	55	970	970	0.0
22	Popeyes Famous Fried Chicken	120	628	7	755*	745	1.3
23	Ponderosa	405	313	32	750*	735	2.0
24	A & W Restaurants	10	642	84	736*	676*	8.9
25	Shoney's	293	427	0	720	680	5.9
26	Waffle House	320	380	0	700*	685*	2.2
27	Sizzler	230	410	48	688	652	5.5
28	Carvel	3	642	18	663	693	(4.3)
29	Captain D's	357	271	0	628	607	3.5
30	Orange Julius of America	1	465	148	614	660	(7.0)
31	Winchell's Donut Houses	530	50	0	580*	633	(8.4)
32	Bonanza Family Restaurants	2	508	64	574*	574	0.0
33	Carl's Jr.	426	141	5	572	534	7.1
34	Round Table Pizza	0	560	7	567	564	0.5
35	Mr. Donut	0	438	84	522	580*	(10.0)
36	Godfather's Pizza	165	347	0	512	504	1.6
37	International House of Pancakes	61	399	30	490	480	2.1
38	Western Sizzlin	5	480	2	487	525	(7.2)
39	Golden Corral	447	27	0	474	525	(9.7)
40	Sbarro	351	71	34	456*	384	18.8
41	Kettle Restaurants	279	171	0	450	425	5.9
42	Taco John's	12	432	0	444	444	0.0
43	Pizza Inn	38	387	0	425	468	(9.2)
44	Perkins Restaurants	113	280	6	399	371	7.5
45	Blimpie	0	398	0	398	330	20.6
46	Rax Restaurants	110	272	3	385	490	(21.4)
47	Haagen-Dazs	5	290	82	377*	357*	5.6
48	Shakey's Pizza Parlors	26	168	182	376	371	1.3
49	Tastee Freez	0	349	13	362	379	(4.5)
50	Wienerschnitzel/Hamburger Stand	99	240	0	339	338	0.3

*Restaurant Business/Technomic Estimate. **Company Estimate. Note: All data for calendar year.